

Sign up:
create a new account

Initial stage

Login

Enter your access details below

Enter your username

Enter your password

Log in

Click to sign up

Change password

Forgot your password?

Password should be at least 8 characters

Sign Up

Create your new account

Choose a username

Create password

Confirm password

Create Account

Back to Login

Click to create account

Login

Success

Login successful!

确定

Enter your password

Log in

Click to sign up

Change password

Forgot your password?

Login

Enter your access details below

Enter your username

Enter your password

Log in

Click to sign up

Change password

Forgot your password?

Sign Up

Success

Account created successfully!

确定

Create password

Confirm password

Create Account

Back to Login

Login page:

login with different accounts or change password

Sign up with different accounts

Login

Enter your access details below

Enter your username

Enter your password

Log in

Click to sign up

Change password

Forgot your password?

Click to change password

Click to ask the admin for
reset in case that
you forget your password

Change Password

Enter your current and new password

Username

user123

Current Password

••••••••

New Password

Enter new password (min 8 characters)

Confirm New Password

Re-enter new password

Change Password

Back to Login

[Go to enterprise edition](#)



Search with key words or characters

Floating buttons - Manual input

► Delete item

Long text input
and recognize
automatically

Give more AI suggestions

Navigation box, go to relevant pages

Reminder parter

Pie chart to show the categories

AI suggestions based on current deals

Start analysis

→ Text Input

 Manual Input

 Manually enter consumption records

Please enter detailed consumption information

Time of transaction:

Counterparty:

Product Description:

Amount (Yuan):

Cancel

Text Input Analysis

Please enter or paste the consumption record text

At 13:14:30 p.m. on May 20, 2025, it costs 1257.5 yuan to buy an air ticket at China Southern Airlines

Confirm Expense Records

Found the following expense entries, confirm to save? (Editable before saving)

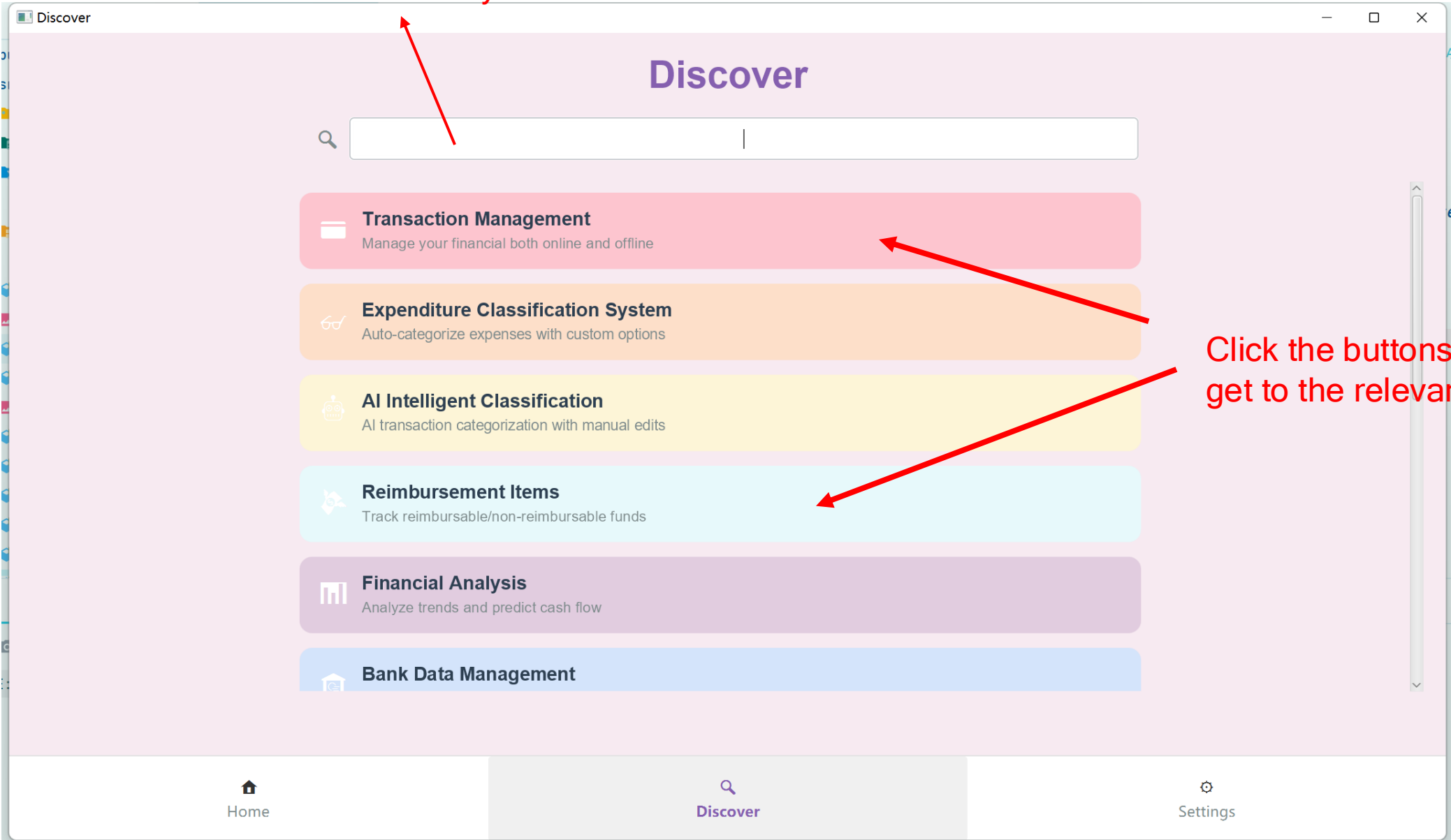
[illegible]

Report Recognition Issue

100

Discover: the page for functions integration

Click to search items with key words in function name



Click the buttons to get to the relevant page

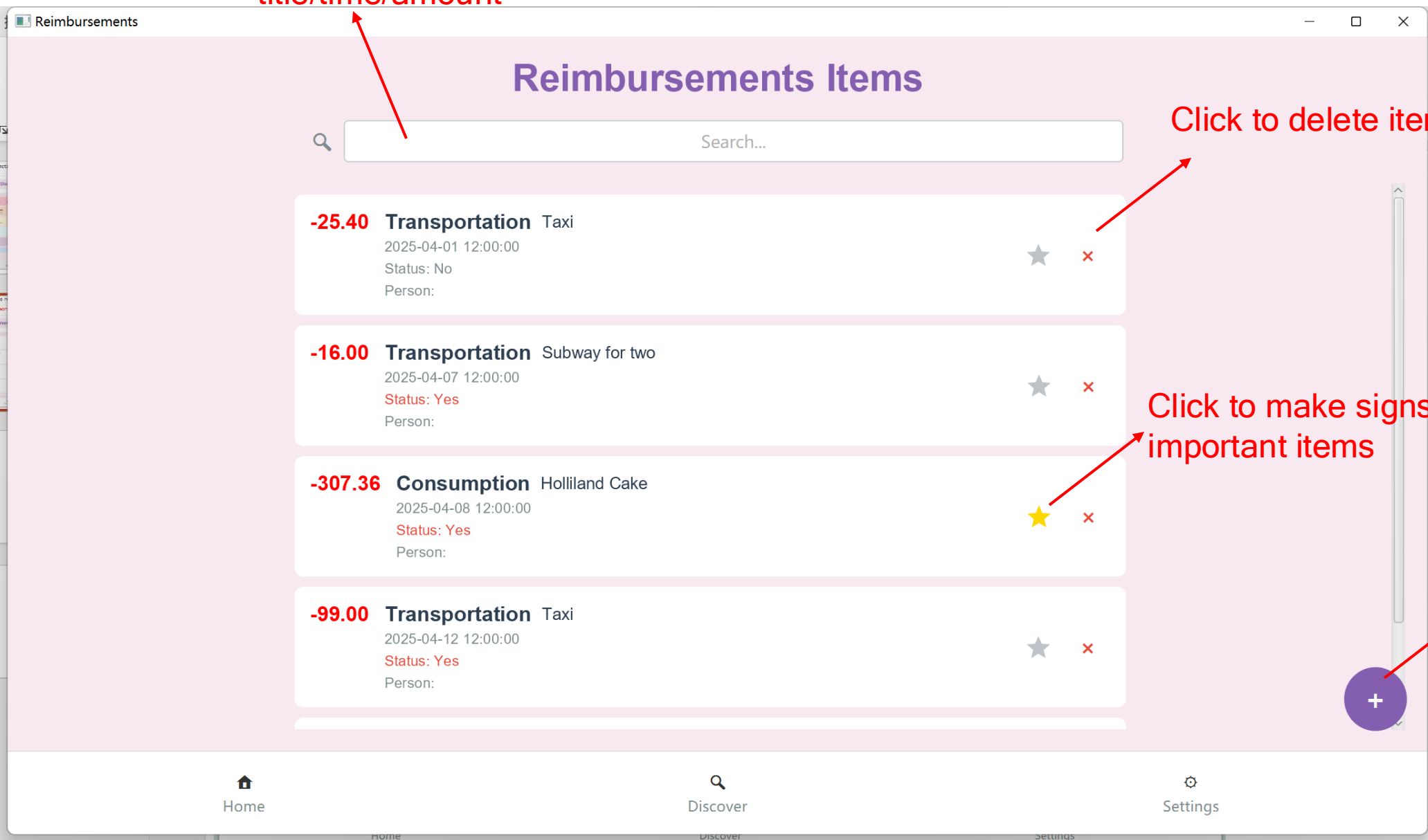
Reimbursement Items: the list to record the transaction items that need to reimburse

Click to search items with key words in title/time/amount

Click to delete item

Click to make signs for important items

Click to add new item



Add New Reimbursement Items: the page to add new reimbursement item

Click to return to list and drop current form

Add New Reimbursement Item

← Back

Add New Reimbursement Item

* Required fields

Reimbursement Title *

Transportation

Click to modify category title(mandatory)

Is it reimbursable? *

Yes, needs a reminder.

No, just record.

choose the importance level of the item(optional)

Estimated Date of reimbursement Arrival

2025-04-15 12:00:00

Click to add the date of the reimbursement to receive the reminder information

Reimbursement Amount *

Fill in the amount corresponding to the reimbursement reminder payment.

0

fill in the reimbursement amount(mandatory)

Notes

Click to add notes.

fill in details and notes

Reimbursement Responsible Person

Select the reimbursement contact person.

Financial Office

Financial Office

The Accountant

Direct Superior

choose relevant responsible person or office

Click to clear or save

Clear all

Confirm

International Transaction Items: A list of multi-currency transactions that are recorded across borders

Click to search items with key words in
currency/time/amount

International Transaction Items



Click to delete item

-1460.0 USD (200.00)

2025-04-02



-109.5 USD (15.00)

2025-04-02



-365.0 USD (50.00)

2025-04-03



-166.0 EUR (20.00)

2025-04-05



-853.6 GBP (46.00)

2025-04-06



-381.8 EUR (88.00)

2025-04-06



Click to make signs for
important items

Click to add new
item



Add New International Transactions: The page to add new international transactions

Click to return to list and drop current form

International Transaction Recorder

← Back

Add New International Transactions

* Required fields

Local currency *

CNY

Foreign currency *

GBP

Amount in foreign currency *

Click here to input the amount in foreign currency

Trading time *

2025/4/10

Clear all

Confirm

Click to select the local currency, which will be CNY by default

Click here to input the amount in foreign currency

Click to select when the transaction occurred

Click to clear or save

Click here to input the kind of foreign currency

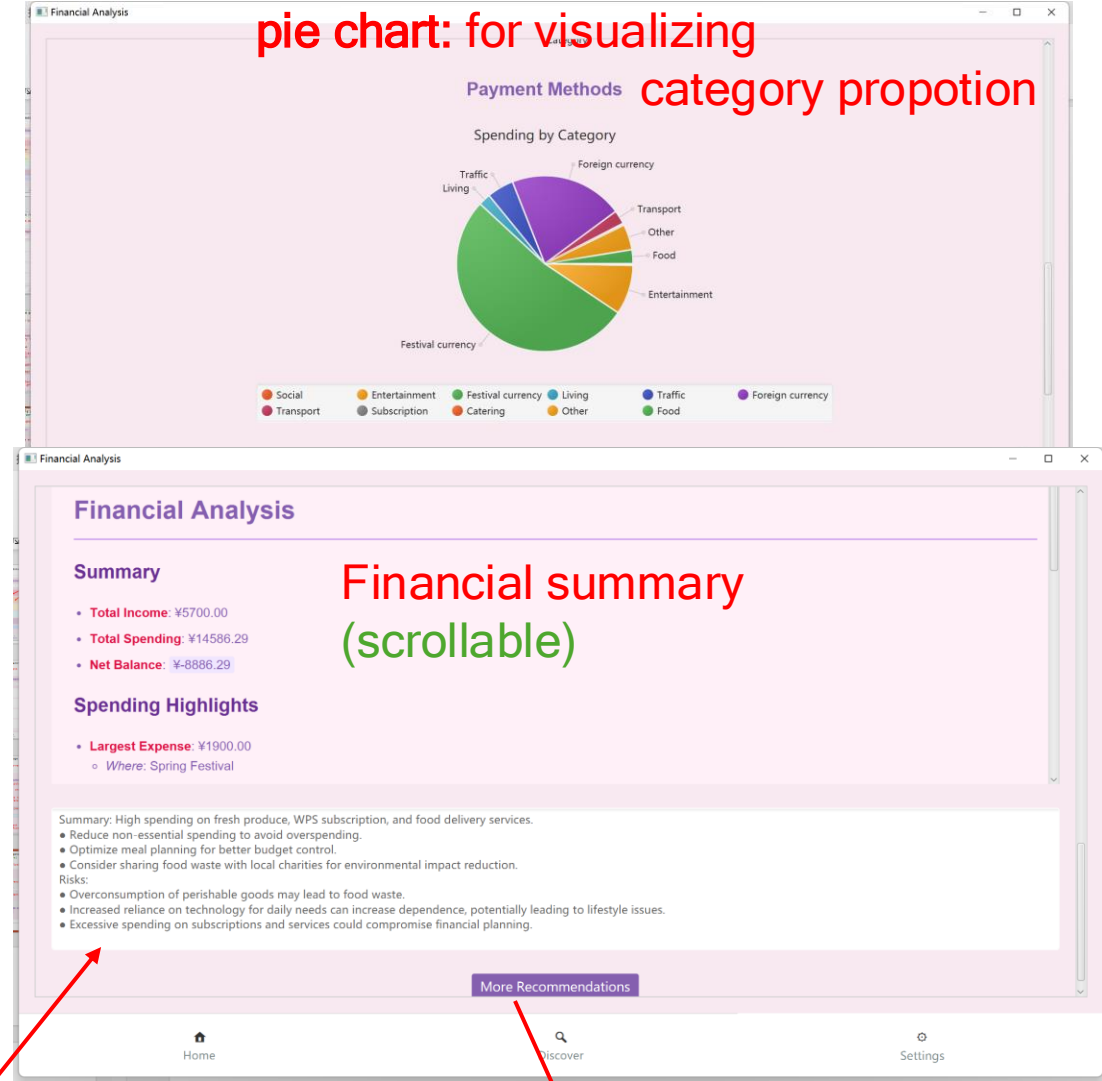
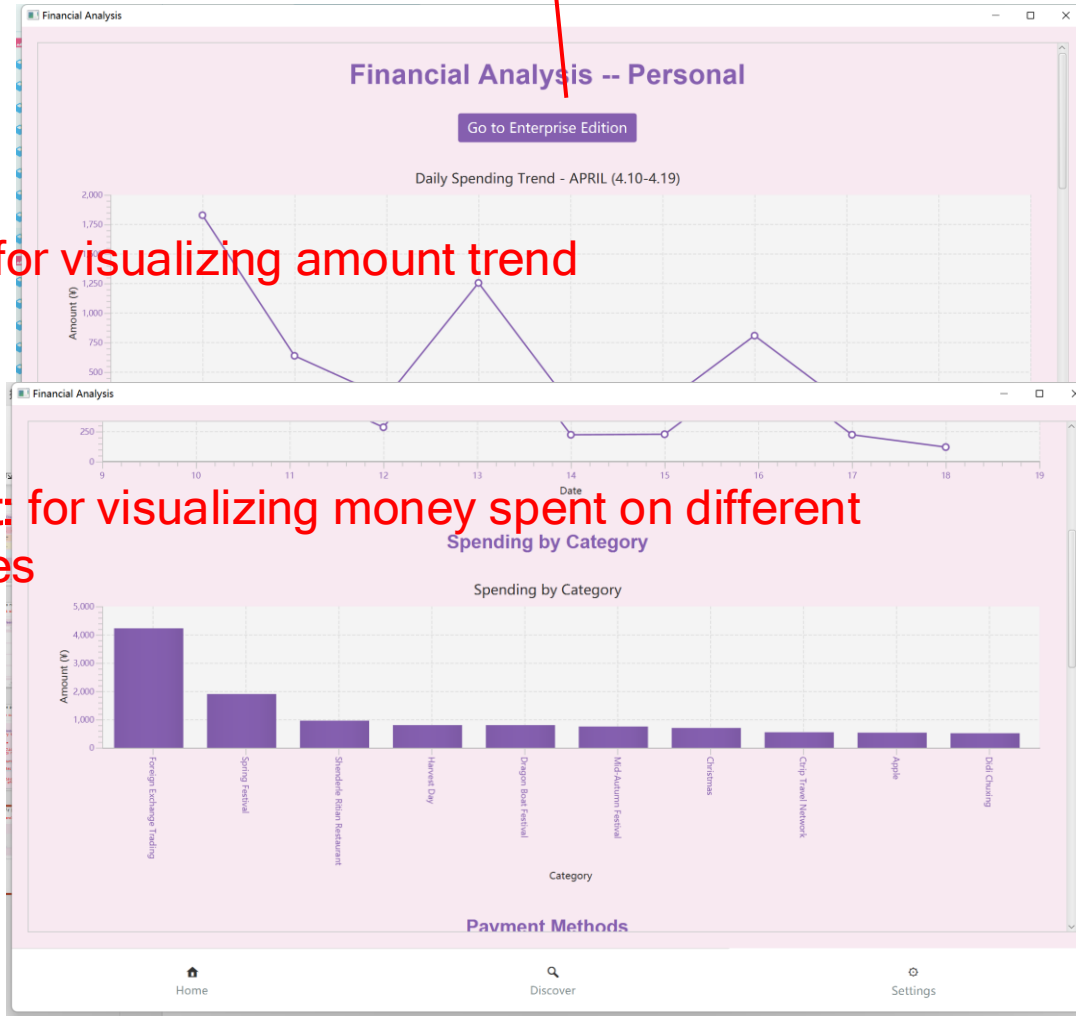
CNY
USD
EUR
GBP
JPY
HKD
AUD
NZD
SGD
CHF

Click to select a foreign currency, which can be selected from the drop-down menu

Financial Analysis: Automatically generate visual charts based on the transactions

(Scroll down the page to see more)

Click to go to Enterprise bills analysis



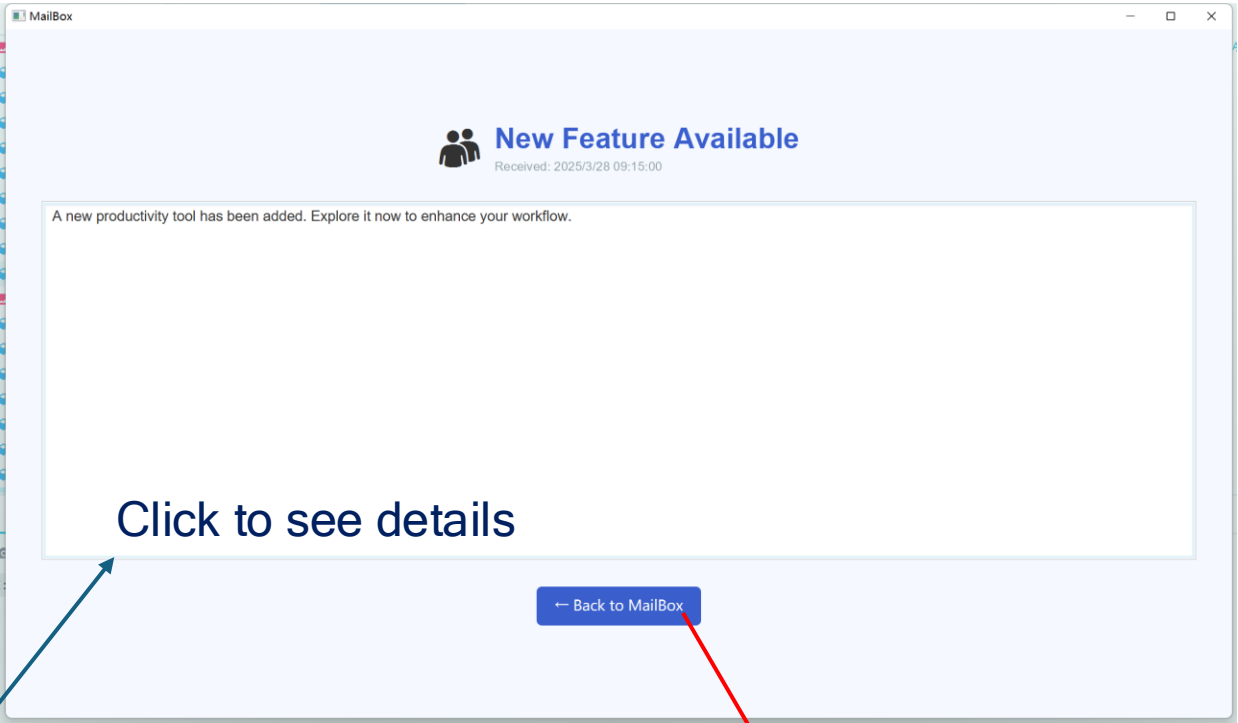
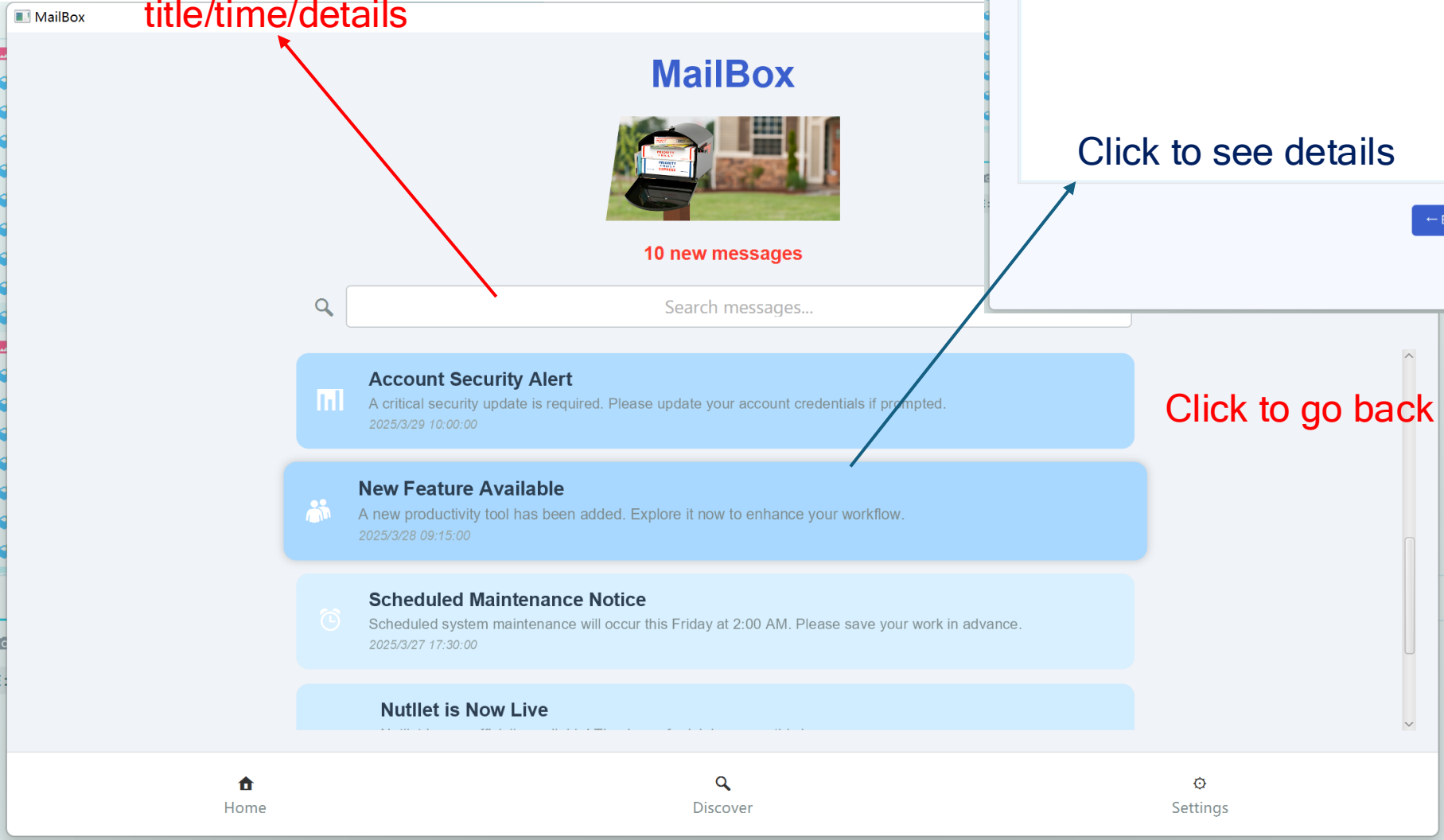
AI analysis part: giving advice based on the consumptions of the deals

Click to get more recommendations

Mailbox: receive developer messages and write feedback for the app

(Scroll down the page to see more)

Click to search items with key words in title/time/details



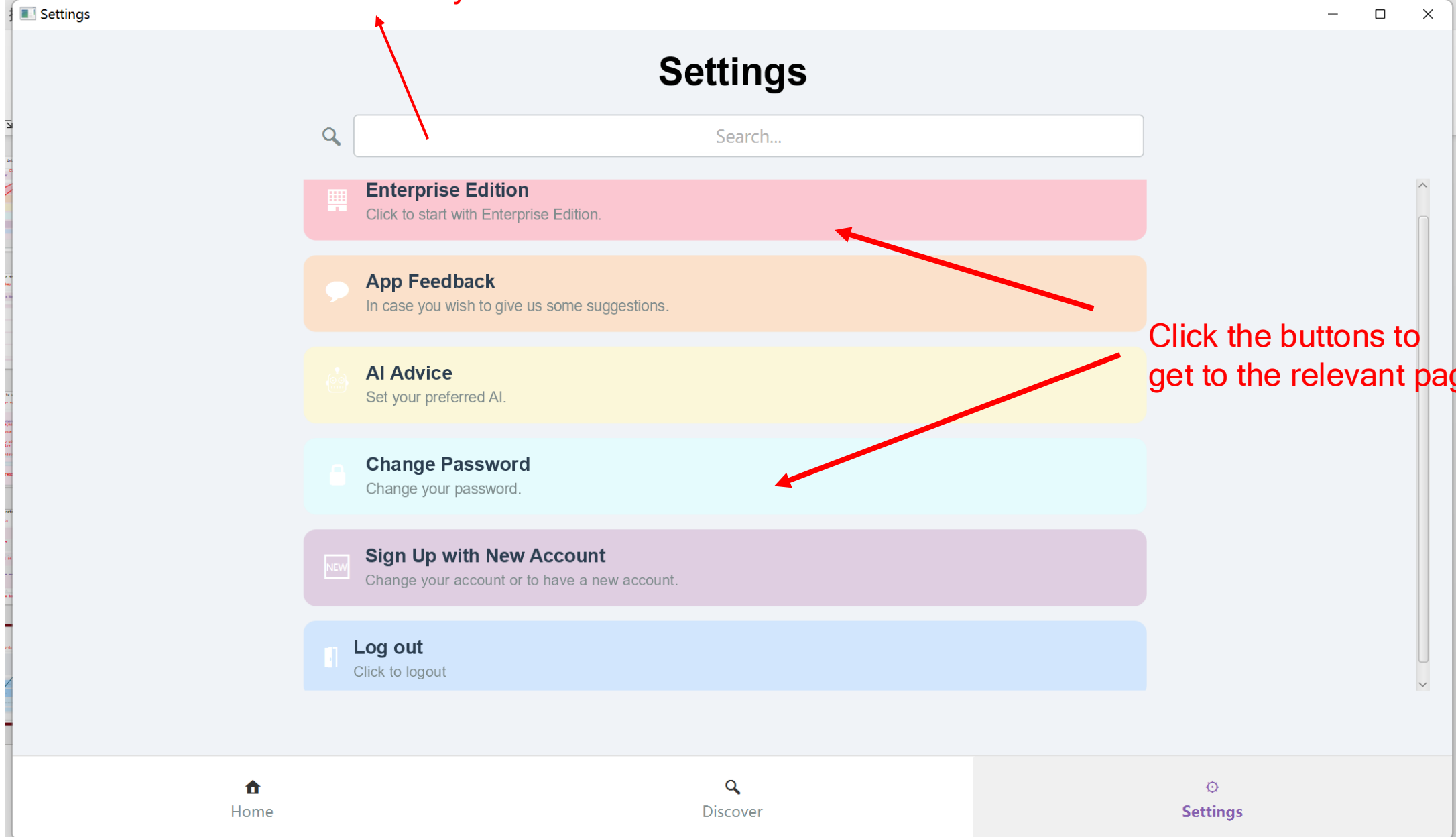
Click to see details

← Back to MailBox

Click to go back to the mailbox page

Settings: basic functions for account operations

Click to search items with key words in function name



Click the buttons to get to the relevant page

Bank Data Management

Bank Data Viewer

Bank Data Management

Manage your bank accounts and transactions

Transaction Records

Date	Description	Amount	Type
2025-04-02 00:00:00	USD Exchange (200...	1460.00	Payment successful
2025-04-02 00:00:00	USD Exchange (15....	109.50	Payment successful
2025-04-03 00:00:00	USD Exchange (50....	365.00	Payment successful
2025-04-05 00:00:00	EUR Exchange (20.00)	166.00	Payment successful
2025-04-06 00:00:00	GBP Exchange (46.00)	853.60	Payment successful
2025-04-06 00:00:00	EUR Exchange (88.00)	381.80	Payment successful
2025-04-08 00:00:00	EUR Exchange (32.00)	41.50	Payment successful
2025-04-08 00:00:00	GBP Exchange (6.00)	58.20	Payment successful

The system will automatically integrate and display transaction details.

Bank Accounts

ICBC

6222 1234 5678 9012

Bank of China

6217 8888 0000 9999

China Merchants Bank

6234 5678 9012 3456

CCB

6225 4321 9876 5432

ABC

6210 1122 3344 5566

Import Bank CSV

+ Add Account

Click this button to delete an account

Add New Bank Account

Please enter the account details:

Account Number:

12345

Bank Name:

icbc

Add

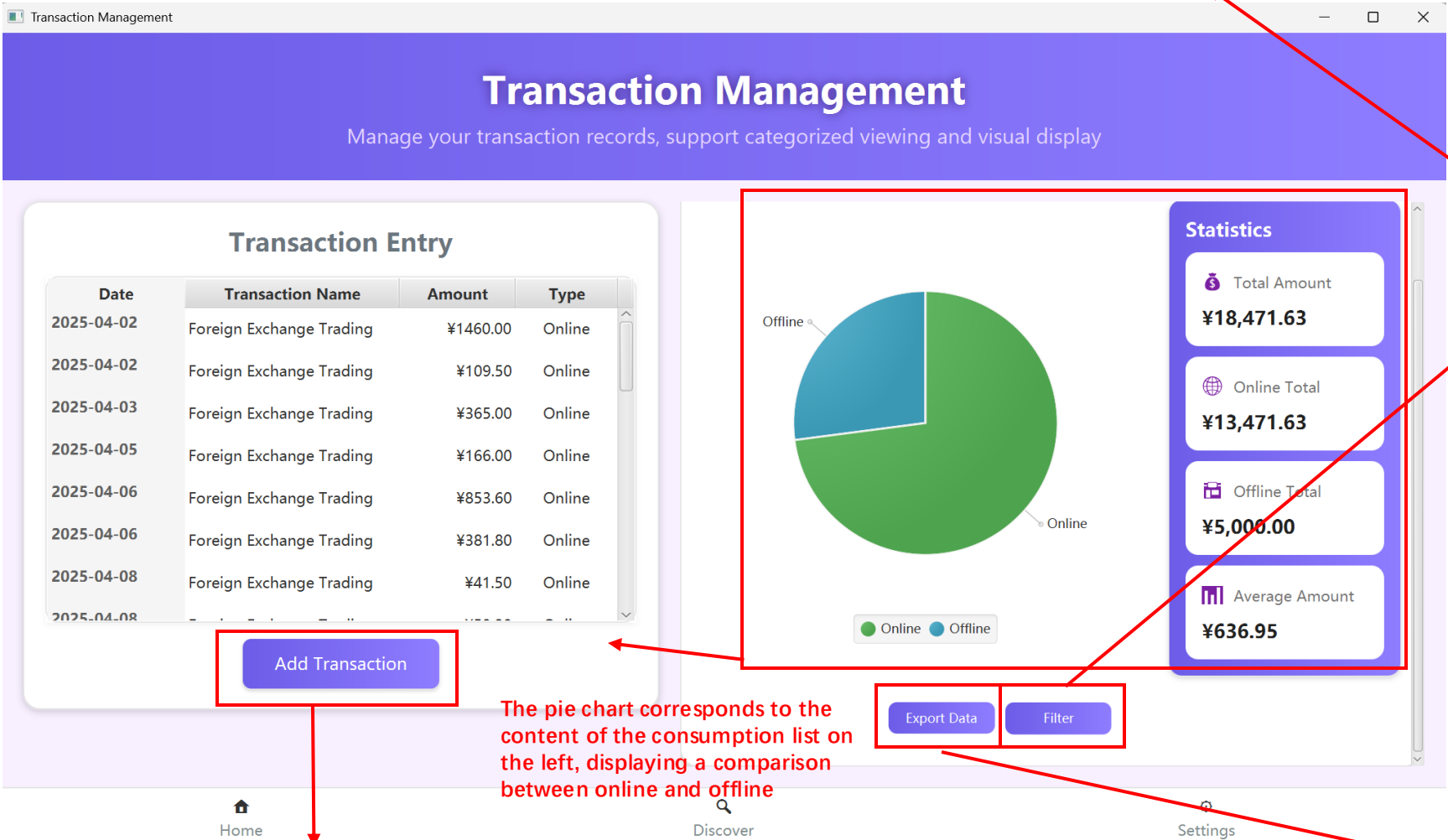
取消

Click this button to add a new bank account

Click this button to import new csv file,
which will show on the left side

Transaction Management

Manually select the time range and amount range here, as well as whether it is online or offline



The "Filter Transactions" dialog box allows users to refine their search. It includes fields for "Date Range" (from 2025/4/10 to 2025/5/12), "Amount Range" (Min Amount and Max Amount), and "Transaction Type" (All, Online, Offline). An "Apply Filter" button is at the bottom.

Click this button to select the range of transaction items you want to view

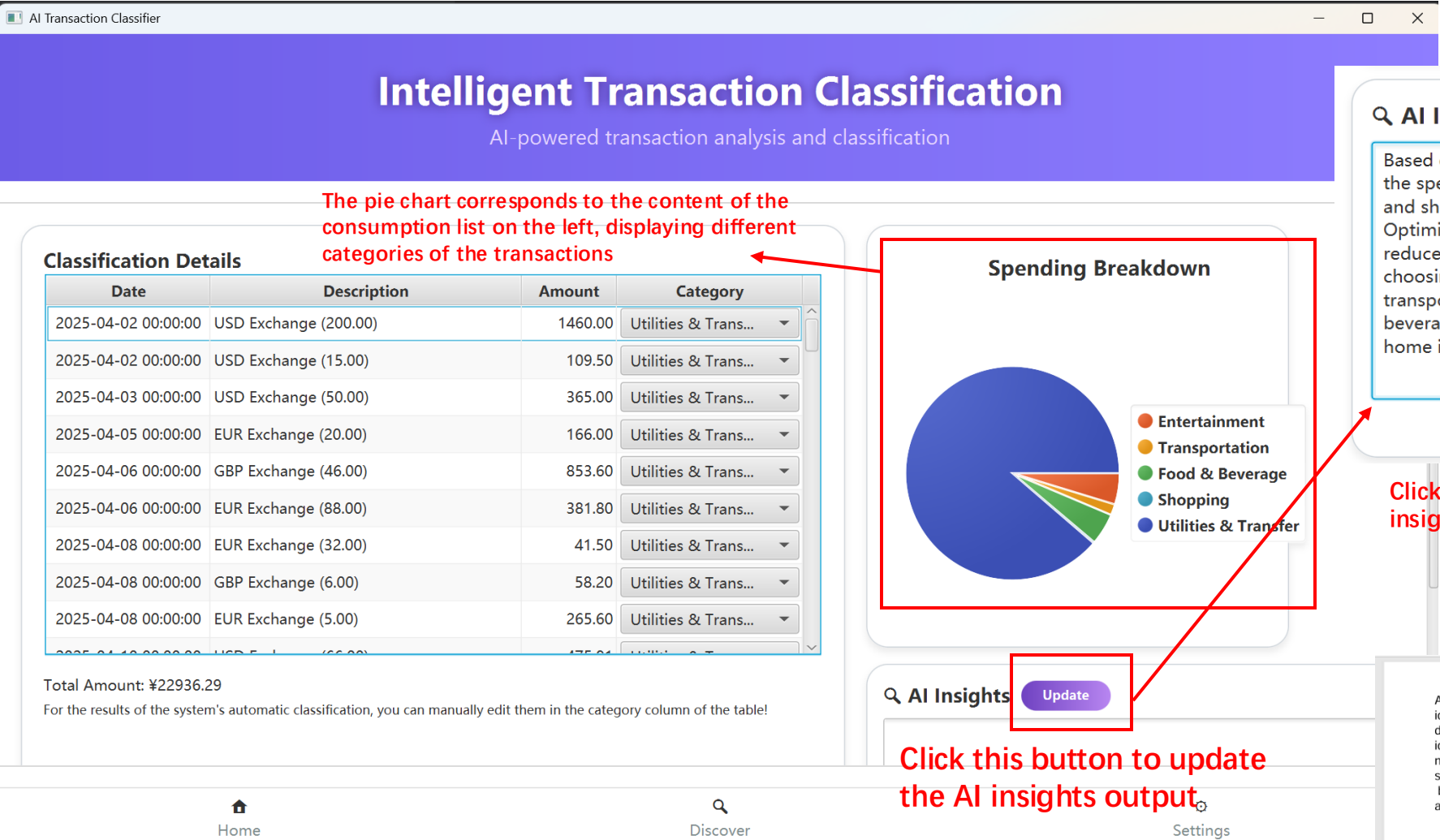
The "Export Data" dialog box displays the message "Results cannot be changed" and features an "Export as CSV" button.

Click this button to add a new entry of transaction

The pie chart corresponds to the content of the consumption list on the left, displaying a comparison between online and offline

Click this button to export the filtered csv

Intelligent Transaction Classification



Click the button again to update again

AI Insights

Update

Based on the provided consumption statistics, it seems that most of the spending is allocated towards transportation, food & beverage, and shopping. Entertainment expenses are relatively low. Optimization Suggestions: • Prioritize savings for entertainment to reduce overall spending. • Optimize transportation spending by choosing more affordable modes of transport or using public transportation more frequently. • Focus on reducing food & beverage expenses through meal planning or preparing meals at home instead of eating out frequently.

Export Report

Click this button to export the AI generated insights as a PDF and save it locally

Click this button to update the AI insights output

AI Insights

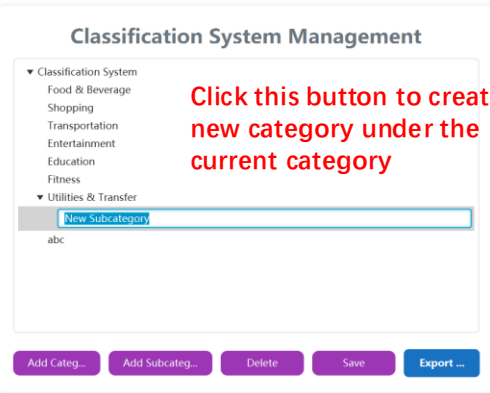
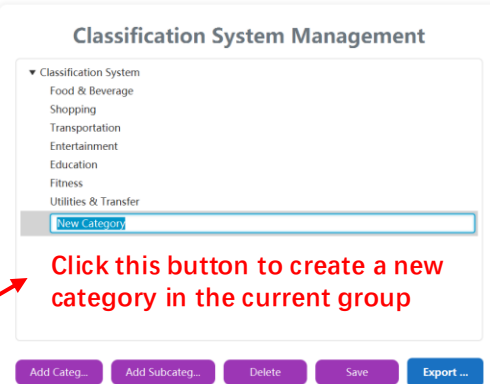
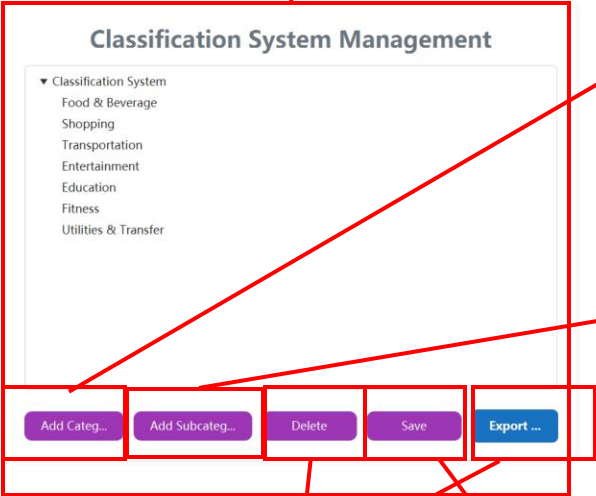
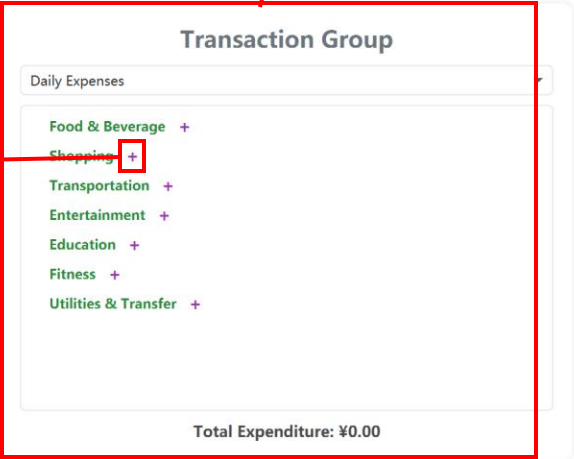
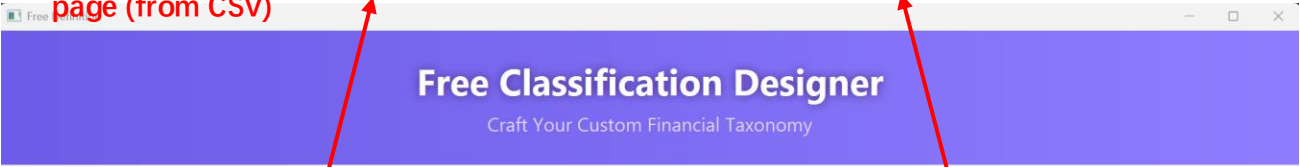
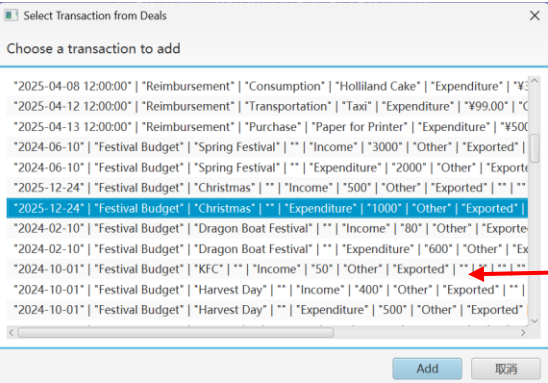
Update

AI Recommendations ===== Based on the provided consumption statistics, it seems that most of the spending is allocated towards transportation, food & beverage, and shopping. Entertainment expenses are relatively low. Optimization Suggestions: ? Prioritize savings for entertainment to reduce overall spending. ? Optimize transportation spending by choosing more affordable modes of transport or using public transportation more frequently. ? Focus on reducing food & beverage expenses through meal planning or preparing meals at home instead of eating out frequently.

Free Classification Designer

You can add or delete consumption items in the structure on the left side of the page (from CSV)

You can edit the current classification structure on the right side of the page



You click this button to add a new entry from the CSV file

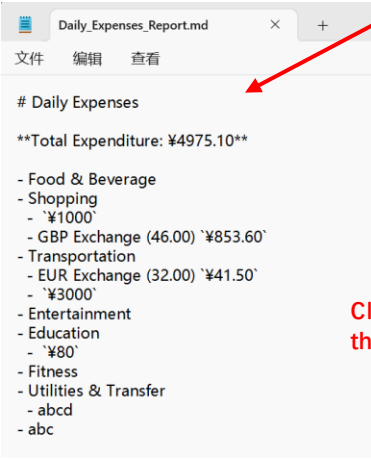


Click the minus sign to delete the added item

Total Expenditure: ¥1000.00

The data here shows the total amount of the current group

Click this button to export all current data in markdown format



Click this button to save the current modifications, and the category structure will be updated on the left

Click this button to delete the selected category

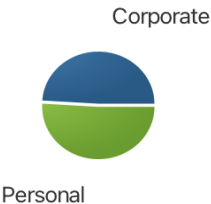


Enterprise Revenue & Expendi...



Balance: ¥-10833.64

Personal VS Corporate Expen...



Total Expenditures: ¥27159.93

Recent Income or Expenditure

The transaction time, product name, receipt/payment type and amount are displayed below

024-02-20 12:36:38	Canon EOS R10 entry level micro single half frame camera E	
024-03-13 01:14:06	Youbasket ulanzi youbasket vl49rgb magnetic absorption fill	
024-03-13 01:14:15	Youbasket ulanzi VT02 aluminum alloy tripod hydraulic pan til	
024-03-13 15:07:01	Canon rf50 1.8 full frame standard fixed focus lens Expenditu	
024-03-19 01:08:20	Beiyang 60cm two in one reflector Expenditure ¥18.80	
025-04-15 15:09:11	Pay after purchase	Expenditure ¥5.00
025-04-15 14:46:25	Meal expense	Expenditure ¥15.00
025-04-15 09:35:19	Meal expense	Expenditure ¥9.00
024-06-16 08:51:43	Seven craftsman round filter bag Expenditure ¥58.6	
024-11-07 21:28:11	Kase color black-mist filter	Expenditure ¥111.92
024-11-07 21:28:12	Kase color filter threaded adapter ring Expenditure ¥26.53	
024-11-08 14:38:57	Sports and publicity service fee Income	¥1280
024-12-11 15:19:40	Godox flash TT520II	Expenditure ¥215.98

Click to import the new enterprise version csv



Smart Financial Trend Analysis

Through automated data visualization, the system presents enterprises with monthly income and expenditure trends, major spending categories, and payment method distributions. This helps managers quickly grasp financial dynamics and promptly identify abnormal ...

Auto-Generated Financial Reports

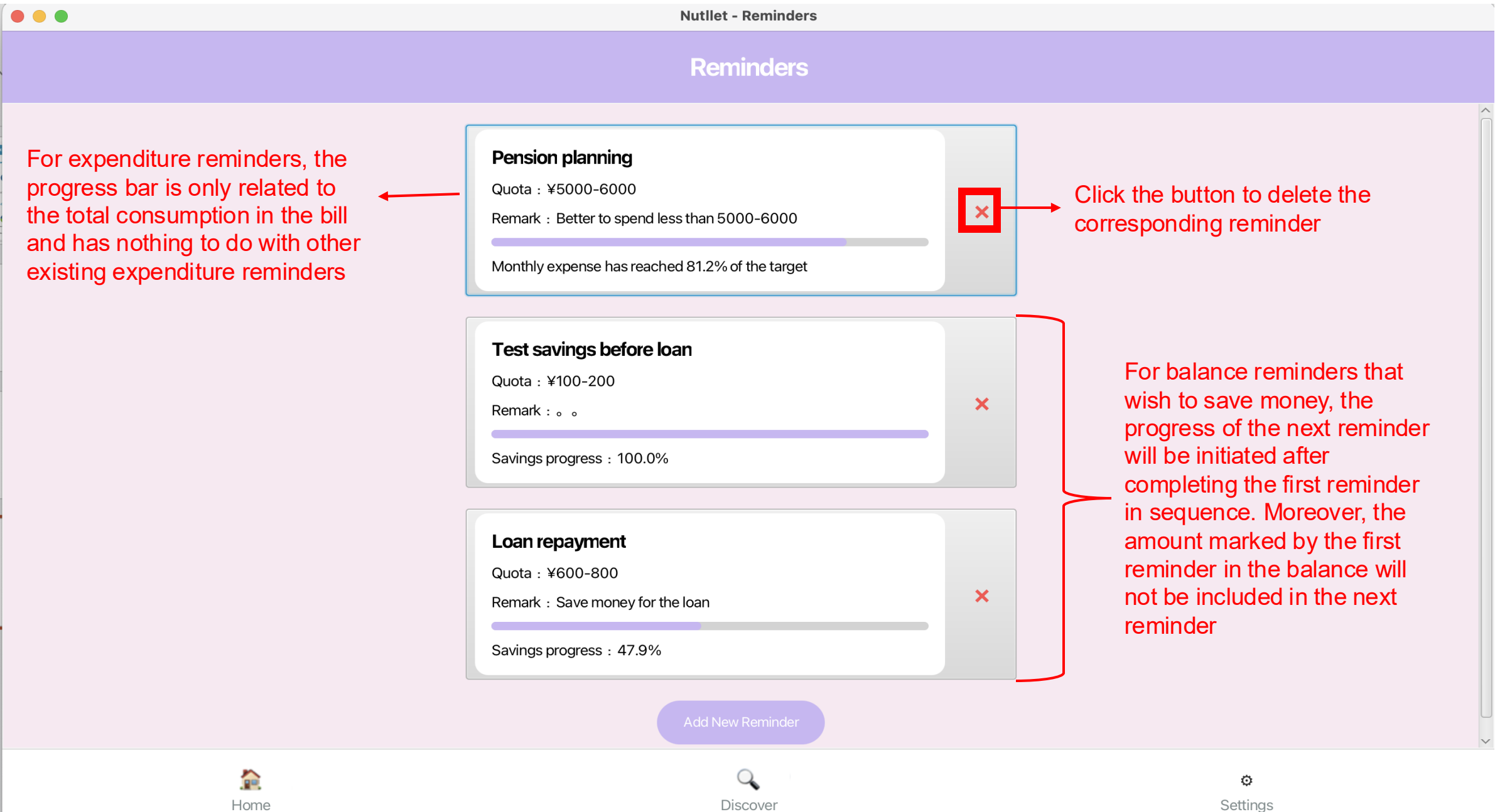
Based on historical transaction data, the system automatically generates comprehensive financial analysis reports with both charts and text. The reports cover key indicators such as total income, total expenditure, net balance, largest single expense, most active spending day, and top spending categories, empowering enterprises to make ...

AI-Powered Optimization Suggestions

With an integrated AI analysis engine, the system automatically interprets enterprise spending behavior, generating trend summaries, risk alerts, and three targeted optimization suggestions. Enterprises can use these insights to adjust financial strategies, improve fund utilizatio...

[VIEW MORE DETAILS](#)

Reminders



Add New Reminder

Nutllet - Add New Reminder

Add New Reminder

1. Your new reminder's name?

Enter your answer here...

2. This reminder is for savings or expense monitoring?

Select an option

For savings

For expense monitoring

Here, select the reminder items to monitor the balance or expenses

3. What do you want your reminder's quota to be?

Min

~

Max

The reminder progress is calculated based on the average value

4. Remark

Enter your remarks here...

Return

Click to directly return to the reminder interface

Done

Click the button to save the reminder

Localized Budgeting

Festival Selection *

Choose the festival and set your preferred budget

Festival Date Range *

Choose the time range you will receive the budget

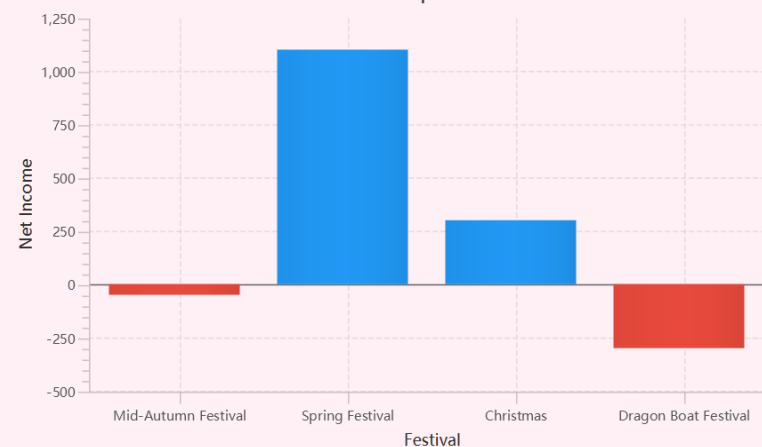
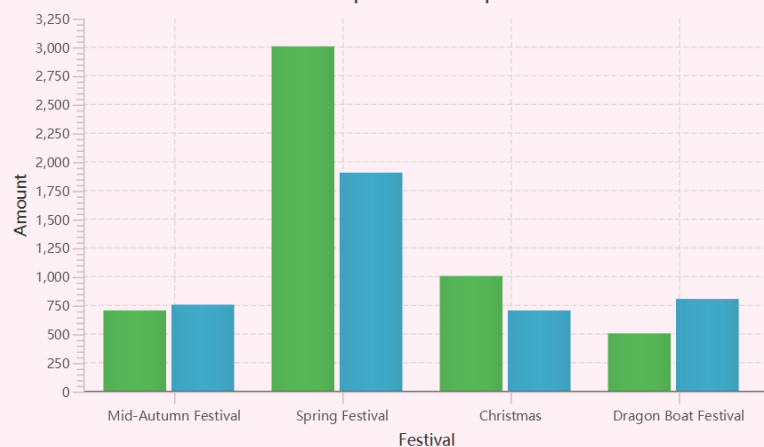
Enter the amount value

Notes

You should firstly select the 3 options above, then input the income&expenses, after that, click the "Save" button to record your information. It will be shown on the upper-right side of this interface

Budget Data

Delete Import bill Export bill Refresh



[illegible]

[illegible]

Localized Budgeting – import csv file

Step 1: Prepare a new csv file

```

74 "2025-04-10 15:35:00","Merchant Consumption","Yuxi Technology","Pay after purchase","Expenditure",
75 "2025-04-10 12:58:00","Merchant Consumption","Apple","apple.com-bill-MXKY9KQJSDa0","Expenditure",
76 "2025-04-10 12:57:00","Merchant Consumption","Apple","apple.com-bill-MXKY9KQJSDa0","Expenditure",
77
78
79
80 "2025-04-17 12:00:00","Reimbursement","purchase","pen","Expenditure","¥100","Change","Yes","", "Th
81
82 "2025-04-10 00:00:00","International Transactions","Foreign Exchange Trading","USDEXchange(6.50)"
83 2024-02-10,Festival Budget,Spring Festival,,Income,3000,Other,Exported,,
84 2024-02-10,Festival Budget,Spring Festival,,Expenditure,1900,Other,Exported,,
85 2024-06-10,Festival Budget,Dragon Boat Festival,,Income,500,Other,Exported,,
86 2024-06-10,Festival Budget,Dragon Boat Festival,,Expenditure,800,Other,Exported,,
87 2024-09-15,Festival Budget,Mid-Autumn Festival,,Income,700,Other,Exported,,
88 2024-09-15,Festival Budget,Mid-Autumn Festival,,Expenditure,750,Other,Exported,,
89 2024-12-25,Festival Budget,Christmas,Income,1000,Other,Exported,,
90 2024-12-25,Festival Budget,Christmas,Expenditure,700,Other,Exported,,
91 2024-12-26,Festival Budget,Chri,,Expenditure,700,Other,Exported,,

```

[illegible]

Step 2: Click the "Import bill" button here



Festival	Date Range	Income	Expenses	Notes
Mid-Autumn Festival	2024-09-15 - 2024-09-15	700	750	None.
Spring Festival	2024-02-10 - 2024-02-10	3000	1900	None.
Christmas	2024-12-25 - 2024-12-25	1000	700	None.
Dragon Boat Festival	2024-06-10 - 2024-06-10	500	800	None.
Chri	2024-12-26 - 2024-12-26	0	700	None.

 Prompt

Bill imported successfully!

确定

Localized Budgeting – export csv file

[illegible]

Budget Data

Festival	Date Range	Income	Expenses	Notes
Mid-Autumn Festival	2024-09-15 - 2024-09-15	700	750	None.
Spring Festival	2024-02-10 - 2024-02-10	3000	1900	None.
Christmas	2024-12-25 - 2024-12-25	1000	700	None.
Dragon Boat Festival	2024-06-10 - 2024-06-10	500	800	None.
sadasd	2025-05-27 - 2025-05-27	10	1110	None.

Prompt

i

Bill exported successfully! deals.csv has been synchronized with the current data.

确定

Delete

Import bill

Export bill

Refresh



```

test_user_credentials.csv      deals.csv      X      DBN_Robot_Tracking_Inference.ipynb      Kalman_Filter_Turtle.j
> Users > LXH > Desktop > Merge > deals.csv > data
1      WeChat Payment Statement Details WeChat Nickname: [Start Time: [2025-04-10 09:40:16] End
68      "2025-04-11 09:55:00", "Merchant Consumption", "JD Daojia", "Jingdong Da Jia 25086757180197
69      "2025-04-11 08:54:00", "Merchant Consumption", "Apple", "apple.com-bill-MXKY9MG64Na0", "Expe
70      "2025-04-11 04:53:00", "Merchant Consumption", "Apple", "apple.com-bill-MXKY9MG65Q4a0", "Expe
71      "2025-04-10 20:51:00", "Merchant Consumption", "Didi Chuxing", "Pay after riding", "Expendit
72      "2025-04-10 20:18:00", "Merchant Consumption", "Shenderle Ritian Restaurant", "Shende Le Ri
73      "2025-04-10 18:43:00", "Merchant Consumption", "Didi Chuxing", "Didi Premium - Mr. Sun - Ap
74      "2025-04-10 15:35:00", "Merchant Consumption", "Yuxi Technology", "Pay after purchase", "Expi
75      "2025-04-10 12:58:00", "Merchant Consumption", "Apple", "apple.com-bill-MXKY9KQJSDa0", "Expe
76      "2025-04-10 12:57:00", "Merchant Consumption", "Apple", "apple.com-bill-MXKY9KQJSD3a0", "Expe
77
78
79
80      "2025-04-17 12:00:00", "Reimbursement", "purchase", "pen", "Expenditure", "¥100", "Change", "Ye
81
82      "2025-04-10 00:00:00", "International Transactions", "Foreign Exchange Trading", "USDEXchan
83      2024-09-15, Festival Budget, Mid-Autumn Festival, Income, 700, Other, Exported, , ,
84      2024-09-15, Festival Budget, Mid-Autumn Festival, Expenditure, 750, Other, Exported, , ,
85      2024-02-10, Festival Budget, Spring Festival, Income, 3000, Other, Exported, , ,
86      2024-02-10, Festival Budget, Spring Festival, Expenditure, 1900, Other, Exported, , ,
87      2024-12-25, Festival Budget, Christmas, Income, 1000, Other, Exported, , ,
88      2024-12-25, Festival Budget, Christmas, Expenditure, 700, Other, Exported, , ,
89      2024-06-10, Festival Budget, Dragon Boat Festival, Income, 500, Other, Exported, , ,
90      2024-06-10, Festival Budget, Dragon Boat Festival, Expenditure, 800, Other, Exported, , ,
91      2025-05-27, Festival Budget, sadasd, Income, 10, Other, Exported, , ,
92      2025-05-27, Festival Budget, sadasd, Expenditure, 1110, Other, Exported, . . .

```